



Quick Reference to Common Tasks in Zotero

Important sites:

Libraries' guide to Zotero: www.lib.ncsu.edu/guides/zotero/ (FAQs, configuration tips, etc.)

Zotero home: www.zotero.org (more complete support and documentation)

Ask a librarian for any help: www.lib.ncsu.edu/askus (quick help from a librarian)

Installing Zotero:

Download PC or Mac version from the Zotero web site. Firefox browser is required.

- Zotero works as a Firefox browser plugin. Installing will require a quick restart of the browser.

After installing:


- Firefox resumes with a tab open to create a Zotero account. Doing so is strongly recommended. Zotero accounts allow you to sync your references between computers and use groups.
- Set NCSU preferences (see Libraries' guide for details). Click the Actions icon (gear icon), go to Preferences. In the Advanced tab, near the bottom, is box for OpenURL preferences. Change the resolver link to <http://findtext.lib.ncsu.edu/>

Getting references into Zotero:

Method 1: One-click (when supported). Try this first. General steps:

- From a database, journal site, or other website, look for an icon next to the URL. Some examples you may see:



- Click the icon to save to Zotero (for multiple articles, check the ones you want)
 - Citations get saved in the most recently viewed collection – drag & drop to move
- Web sites may not display any icon. To save them, open Zotero, use the Add Item icon: 
 - Any time you do this, check to be sure that all pertinent information has been captured!

Method 2: Manual Import (when one-click is not supported or not working). General steps:

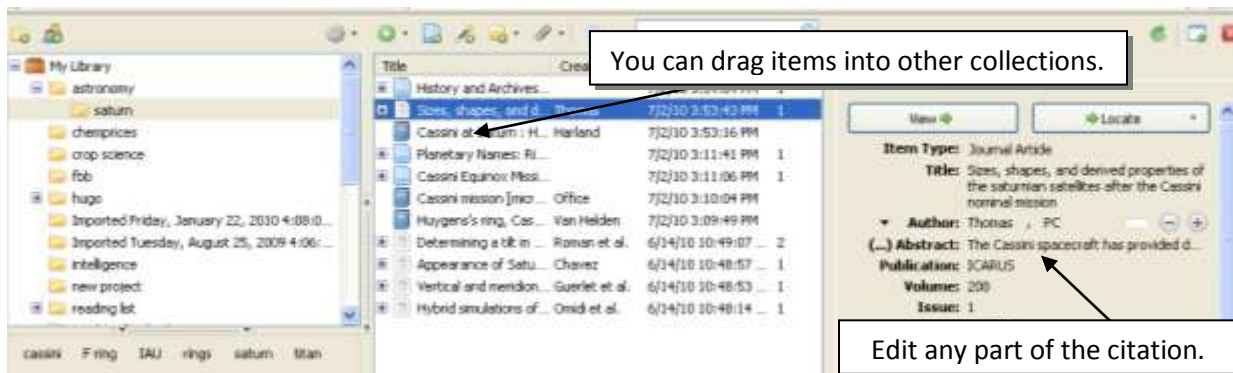
- From a database or journal site, mark references you want to save.
- Look for a link to save or export. Exporting creates a text file to save. If there is a “reference software” or “RIS” format option, use that. This is a general format Zotero can use.
 - Tip! Is there an option to export to EndNote? This might also work. Zotero uses the same general format.
- Open Zotero. Click the Actions (gear) icon—Import.

Getting references out of Zotero:

Click the Action (gear) icon->Export Library. Choose an output option. The RIS format is a general format other citation management software programs will recognize.

Staying organized by using collections:

Use Collections (they look like folders) to organize your citations. You can create subfolders, too.



- One citation can be in any number of collections.
- Can't find a reference you've imported? Check My Library, which contains all of your citations.

Things to try:

- **Link to articles online.** Requires some configuration, see Libraries' Zotero guide for instructions.
- **Sync references.** Create an account and sync to access your library between computers.
- **Groups.** Use Groups (zotero.org/groups) to share references and work collaboratively.
- **Drag & Drop references.** Drag and drop into different collections to organize citations. Drag a reference onto any writing area (e.g., a Word doc or e-mail) to copy and format it.
- **Bibliographies.** Right click folders to create bibliographies, or get a plugin to integrate with MS Word. Numerous citation styles are available in Zotero preferences.